



Country or Region: India

Report Title: Cardiac Surgery Equipment (MED)

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Summary

The Indian demand for cardiac care surgery equipment continues to expand. Incidence of cardiac problems keeps increasing due to life styles and stress. To meet the growing demand, both government hospitals and private sector hospitals are upgrading the existing facilities and/or adding new facilities. Cardiac surgeries and angioplasty surgeries are performed by the hospitals to save cardiac patients. Locally manufactured products and imported technologies co-exist in the cardiac treatment. Technically trained agents and distributors are looking for new agency opportunities.

Market Overview:

This report covers the market trends for cardiac surgery equipment such as the ICU equipment, ventilator, intra-aorta balloon angioplasty, operation theater equipment, fibrillators/defibrillators, catheter lab equipment, heart-lung machines, and consumables.

With a population of over 1 billion, and an estimated 200 million middle-income group, the Indian healthcare industry has been growing rapidly. Both government owned hospitals and private sector hospitals co-exist in the country. However the private sector hospitals dominate the healthcare market.

The government also continues to expand the reach of the hospitals to rural India. Between 1981 and 2000, dispensaries and hospitals increased from 23,555 to 43,322; the number of hospital beds from 569,495 to 870,161; the number of doctors from 268,700 to 503,900; and the nursing personnel from 143,887 to 737,000. The Government has launched the National Rural Health Mission (NRHM) 2005-2020 to take healthcare to rural areas. The governments, both at the national level and state levels, continue to upgrade the district level hospitals and specialty hospitals, which act as referral centers for the rural hospitals. All these referral hospitals maintain and keep upgrading the cardiac care department.

Private sector hospitals are located in the state capitals and urban centers of the country. Many hospital groups are expanding their operations to other Indian cities. These major hospital groups buy-out existing small hospitals and upgrade them to add the hospital bed capacity. In spite of this speedy growth, the demand for hospital beds far surpasses the availability.

Heart and heart-related problems are on the increase in India. In a report on 'Tobacco Control in India' the Government of India's Ministry of Health and Family Welfare has stated that cardiovascular related deaths is expected to rise from an estimated 3 million in 2000 to about 4.8 million in 2020. The report also identified the lower middle-income group and the urban poor are vulnerable to the cardiovascular disorders and deaths. Keeping this in mind, the Government of India (GOI) has introduced the tobacco control policy and several states have banned smoking in public places. The GOI also started awareness campaigns besides upgrading the hospital facilities in the country, particularly the cardiac care departments in the government hospitals.

Several private and government hospitals perform heart surgeries of all types, except heart transplants. Non-invasive catheterization techniques are becoming popular in the country and are now used as a major treatment for heart ailments. New cardiac care centers and specialty hospitals are being built in the country and many existing hospitals are planning to expand their cardiac care facilities to meet the growing demand. These hospitals are being established in major cities and large towns.

Market Trends:

Availability of medical insurance coverage continues to support the growth of preventive aspects of the medical programs. Annual health check-ups are becoming popular among the urban middle and upper income groups and this trend is likely to continue for the next five years and beyond.

Major hospitals in the private sector focusing on the heart related treatments and surgery are scattered throughout the country. Cardiology is one of the major specialties of New Delhi headquartered Fortis Healthcare Limited (web site: <http://www.fortishealthcare.com/index.html>). The Apollo Hospital group (web site: <http://www.apollohospitals.com/>), India's first private sector hospital chain with a strong heart care facility, with over 6400 beds in 32 hospitals, maintains 10 cardio-thoracic units, 5 oncology units and over 700 intensive care beds. Sri Satya Sai Institute of Higher Medical Sciences (web site: <http://www.sathyasai.org/saihealth/bnglrhosp.htm>), maintains 333 beds and specializes in cardiology, cardio-thoracic surgery, vascular surgery, neurology and neuro-surgery. Sri Satya Sai has performed over 4765 cardiac surgeries, and 8559 cardiac catheterization during 2001-2004. Sri Ramachandra Medical College and Hospital (web site: <http://www.hostindia.com/srmc/>), a teaching hospital with over 1500 beds, maintains a well-developed cardiac care center and performs cardiac surgeries including angioplasty, stents, balloon valve, pace maker insertions, coronary bypass surgery.

Breach Candy Hospital Trust, Mumbai (<http://www.breachcandyhospital.org/home.htm>), Jaslok Hospital and Research Center (<http://www.jaslokhospital.net/>), P.D. Hinduja National Hospital and Medical Research Center (<http://www.hindujahospital.com/>), the Wockhardt Hospital and Heart Institute (<http://www.whhi.com/>), and the Christian Medical College Hospital (<http://cmch-vellore.edu/main.asp>), are a sample list of hospitals in the private sector maintaining cardiology departments and performing different cardiology surgeries using the latest equipment.

Indian Railways (<http://www.rb.railnet.gov.in/>), Bhabha Atomic Research Center (<http://www.barc.ernet.in/>), Hindustan Aeronautics Limited (<http://www.hal-india.com/>), Steel Authority of India Limited (<http://www.sail.co.in/>), and Employee State Insurance Corporation (<http://esic.nic.in/>) are some of the major government owned operations maintaining multi-specialty hospitals in different locations of the country. List of major Indian hospitals (<http://www.indiadiets.com/Hospitals/index1.htm>)

Import Market:

Indian hospitals continue to import an estimated 45-50% of the cardiac care equipment, including the cardiac care surgery equipment and consumables. Angiogram, heart-lung machines, intra aorta balloon angio plasty, operation theater instruments and supplies, fibrillators, defibrillators, electro-surgical unit (diathermy), infusion pumps and supplies such as probes, catheters and needles are a sample list of items being imported into India. Indian hospitals have imported the 64 bit CT scanners to scan the heart for cardiac disorders.

The U.S. continues to be the single largest supplier of medical equipment to the Indian market with an estimated 35 to 40 percent market share. Several major U.S. firms are present in India either directly or through Indian partners. General Electric, Hewlett Packard, Datex Ohmeda, Datascope, Aloka, Marquette Electronics, Heliage, Spacelabs, Sarns, Baxter, Valley Labs, Bovie, Zoll, Fresenius, Digin, (All U.S.), Siemens, Philips, Braun, Stockert, Jostra, Erbe, Martin (all Europe), Toshiba, Atom, Terumo (all Japan) are some of the major firms actively marketing their technologies to Indian hospitals.

Competition:

Indian firms manufacture a range of cardiac care surgery equipment. Indian firms also import components and assemble medical electronic products including cardiac care equipment. Larsen &

Toubro (<http://www.larsentoubro.com>), India's industrial conglomerate, manufactures and sells a range of medical electronic products, including color Doppler, cardiac revival units, patient monitors, ECG machines, just to mention a few. BPL (<http://www.bplworld.com>) is another major Indian firm, which manufacture a range of medical electronic products, including ECG machine, defibrillators, stress test systems, patient monitors, dual parameter monitors, ultrasound scanners, and oxygenators. Several Indian manufacturers also look for joint venture and licensing opportunities to upgrade their product portfolio.

General Electric, in partnership with Wipro Group, maintains a manufacturing facility to produce a range of cardiology equipment including cath labs, patient monitoring systems, cardiac X-rays, ambulatory holter monitoring, ECG recorders, treadmills, echo cardiograms, cardio-vascular imaging equipment, just to mention a few products. Siemens India and Philips India also have an active presence in India selling their medical equipment including the cardiology equipment.

End Users:

Specialty and super specialty hospitals in the government and private sector are the major end users of cardiac care surgery equipment and supplies. Large Indian business houses such as the Tata group, Reliance, Birla, which maintain specialty hospitals for the benefit of their employees, also are major end users.

Market Entry:

The Government of India's import policy allows imports of medical equipment of all types, including cardiac care surgery equipment, components, spares, and supplies. However, the Government of India's Ministry of Health has notified that sterile devices such as cardiac stents, drug eluting stents, catheters, heart valves, among others, are treated as drugs and have to comply with the Central Drug Standards Control Organisation's guidelines (<http://cdsco.nic.in/>). Currently, medical equipment attracts import duties with a range of 5-20 percent. Life saving medical equipment could be imported duty-free. Please visit www.chennaicustoms.org/ for further information on import procedures and duty details.

Price, quality and after-sales service support are major factors in purchase decisions. Letter of credit is the usual payment mechanism for imports. Technically trained and qualified agents and distributors sell medical equipment to Indian end users. These agents are generally familiar with import regulations and procedures. Government purchases follow a tendering process and all government tenders are time consuming and generally the government decides on the lowest bidder.

Opportunities for Profile Building:

Cardiological Society of India (CSI), Kolkata, a professional association of the cardiac physicians and surgeons, (e-mail: csi@cal2.vsnl.net.in, and web site: <http://www.csi.org.in/>) will be the best association for profile building.

Upcoming Trade Shows:

The Cardiological Society of India (CSI) organizes annual conferences in different parts of the country. The next CSI conference will be held in Hyderabad, December 5-9, 2007. Please visit <http://www.hyderabadcsi.com/> for registration procedures and further conference details.

HospiMedica India is the major health care products trade exhibition held in India. CIDEX Trade Fairs Private Limited, a joint venture between Messe Düsseldorf GmbH and Koelnmesse International GmbH, organizes the show. Please visit the official show web site <http://www.hospimedica-india.com/> for further information and registration procedures.

The second edition of the Hospital India 2007 trade show is a trade event to be held in Bangalore, December 13-15, 2007. Hospital India exhibits equipment, and consumables. Please visit the web site <http://www.hospital-india.com/default.htm> for additional information on the event.

For More Information

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